

**Environmental Management Consolidated Business Center (EMCBC)****Subject: Office of Contracting Workload Management System**Policies, Procedures,  
and PlansAPPROVED: (Signature on File)  
EMCBC Director**1.0 PURPOSE**

The purpose of this procedure is to establish the process for managing workload within the Office of Contracting (OOC). The Electronic Contract Log and Performance System (E-CLPS) Task Manager function is used to assign and track commitment information and specific action items necessary to complete commitments.

**2.0 SCOPE**

The E-CLPS Task Manager function is used to track and monitor assignments and assist the OOC Assistant Director in managing workload and ensuring timely closeout of commitments. This procedure provides the process for assigning and tracking OOC actions.

**3.0 APPLICABILITY**

This procedure applies to all OOC personnel for the assignment, tracking, and closure of commitments.

**4.0 REQUIREMENTS and REFERENCES****4.1 Requirements:**

4.1.1 FY2008 EMCBC Federal Balanced ScoreCard Performance Plan

**4.2 References:**

4.2.1 IP-243-03, Identifying, Filing and Maintaining Records

4.2.2 PL-414-01, EMCBC Quality Assurance Program (QAP)

**5.0 DEFINITIONS**

Procurement Action Lead Time (PALT) – The number of calendar days from OOC receipt of a proper, complete and workable purchase request/purchase order to the effective date of the contract award or order placement.

**6.0 RESPONSIBILITIES**

#### 6.1 OOO Assistant Director:

- 6.1.1 Responsible for assuring assignments are identified and tracked in a consistent manner.
- 6.1.2 Responsible for assuring OOC fulfills all requests in a timely manner and providing Branch Chiefs/Team Leaders with guidance for monitoring and applying adequate resources where required.
- 6.1.3 Responsible for monitoring performance through weekly reviews of reports of open and overdue commitments to monitor performance.

#### 6.2 OOO Branch Chiefs/Team Leaders (BC/TL)

- 6.2.1 Responsible for reviewing action requests in the form of formal correspondence, Controlled Correspondence Tracking System (CCTS) entries, procurement requests, e-mail or corrective actions resulting from audits, assessments, or reviews and making action assignments in E-CLPS Task Manager.
- 6.2.2 Responsible for monitoring the status of open actions to assure actions are completed in a timely manner. In addition, responsible for review and concurrence on outgoing responses to actions generated by respective teams.
- 6.2.3 Responsible for providing timely input of actions into the E-CLPS Task Manager.
- 6.2.4 Responsible for reviewing closure documentation and closing actions in the E-CLPS Task Manager in a timely manner.

#### 6.3 OOO Staff

- 6.3.1 Responsible for completing assigned E-CLPS Task Manager actions by the established due dates.
- 6.3.2 Responsible for providing adequate documentation of closed actions to the respective BC/TL for action closeout.

#### 6.4 Policies and Administrative Support Team

- 6.4.1 Responsible for the administration of E-CLPS.

### 7.0 GENERAL INFORMATION

- 7.1 The commitment data is stored and maintained in the E-CLPS Task Manager and is the source data used to produce open action status and workload reports. The E-CLPS Task Manager is designed to maintain information required to identify, track,

and status OOC commitments and process lead times. The EMCBC Balanced ScoreCard Performance Plan contains a performance metric for PALT, and the data that supports this metric is taken from E-CLPS Task Manager, the Federal Procurement Data System (FPDS), and the Procurement and Assistance Data System (PADS).

7.2 The E-CLPS Task Manager is accessible through the intranet in EMCBC Services and will track OOC commitments. The types of commitments that will be tracked in E-CLPS include, but are not limited to, the following:

- Procurement Requests (PR) – DOE Form 4200.33 or 4250.2;
- Requests for contracting/Financial Assistance actions in advance of formal PR;
- Requests for Equitable Adjustments (REAs)/Contract Changes;
- Data calls from DOE Headquarters;
- Tasks received from DOE Headquarters, serviced sites, or through agreements with other organizations;
- Corporate Activity Requests; and
- Corrective actions resulting from reviews or assessments.

## 8.0 PROCEDURE

8.1 The OOC Assistance Director, BCs/TLs will review action requests and enter action assignments to OOC staff with proposed due dates in the E-CLPS Task Manager.

8.2 The OOC staff shall review actions and provide a description of proposed action in the E-CLPS Task Manager comment field. OOC staff may recommend to the BC/TL a different due date based on the action if one is not stated in the action request.

8.3 On a weekly basis, the PAST will provide a report of actions status to the BC/TL who will then review E-CLPS Task Manager for approaching due dates and request a status if needed from OOC staff. The BC/TL may also request a review of the action response prior to the due date for review.

8.4 When needed, OOC staff may request due date extensions by providing a justification for the extension to the BC/TL for approval. Due dates can only be updated or closed by the OOC Assistant Director or BC/TL.

8.5 Upon action completion, OOC staff shall forward supporting documentation to the BC/TL to support the action closure in E-CLPS Task Manager.

8.6 The BC/TL shall close actions in E-CLPS Task Manager in a timely manner following the receipt of supporting documentation from OOC staff. When extensions to due dates are requested, the BC/TL shall approve or disapprove the extension based on the justification and update E-CLPS Task Manager accordingly.

8.7 OOC staff shall assure that all records that are generated are maintained and stored in accordance with IP-243-03, Identifying, Filing and Maintaining Records.

## 9.0 RECORDS MAINTENANCE

Records generated as a result of implementing this procedure are identified as follows, and are maintained by the Office of Contracting:

9.1 Routine reports generated for management review.

9.2 Reports generated to support Balanced Score Card Performance reporting and assessments.

## 10.0 FORMS USED – Not applicable

## 11.0 ATTACHMENTS – Not applicable

## **EMCBC RECORD OF REVISION**

### DOCUMENT

If there are changes to the controlled document, the revision number increases by one. Indicate changes by one of the following:

- l Placing a vertical black line in the margin adjacent to sentence or paragraph that was revised.
- l Placing the words GENERAL REVISION at the beginning of the test.

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<b>Rev. No.</b>	<b>Description of Changes</b>	<b>Revision on Pages</b>	<b>Date</b>
1	Original Issue	All	12/3/07